

BUTCHER, BAKER, OR CANDLESTICK-MAKER

Thomas Baker

Alice Baker entered the SRS office requesting assistance for her husband, Thomas. During the interview, Alice relayed the following story:

Her husband, Thomas, had been a butcher all his adult life. He went to work for Cutright Meats as a butcher in 1960. They were married about a year later. Thomas worked hard and they had 2 children, who have since grown and moved out of state. In 200_, Thomas became ill with cancer. With treatment, the cancer went into remission and he did well until _____. 200_. The cancer had returned and although he had undergone treatment again, he was not responding well. On _____, 200_, Thomas could no longer remain at home and was placed in Sunshine Nursing Home. Alice says that they had enough money put away to last this long, but she's starting to become concerned. The doctor says that Thomas could go at any time, or he could live for years. It's just hard to tell right now.

The resources are being eaten up by the NF costs. When Thomas first went into the NF in _____, they had the following resources: (These resource amounts are based on the highest balances in _____)

1st Bank Checking #7843	Alice	\$10,000
1st Bank Checking #0047	Thomas	\$15,000
Cap Fed Savings #998331	Alice & Thomas	\$65,000
Old American LI #D9875	Thomas	\$10,000/\$2000
Old American LI #D9876	Alice	<u>\$12,000/\$3700</u>
Total=		

As of the month of application _____, this is all that's left: (These resource amounts are based on the lowest balances in _____, this includes subtracting the income deposited in the accounts from the lowest balance)

1st Bank Checking #7843	Alice	\$ 2,500
1st Bank Checking #0047	Thomas	\$ 11,400
Cap Fed Savings #998331	Alice & Thomas	\$30,000
Old American LI #D9875	Thomas	\$10,000/\$2050
Old American LI #D9876	Alice	<u>\$12,000/\$3775</u>
Total=		

Alice is struggling to make ends meet as they still have a monthly mortgage payment of \$400 (includes property tax) on their \$70,000 house (they owe \$30,000 on the house) and the annual homeowner's insurance premium is \$300. Thomas receives \$1300(after \$96.40 deducted) monthly from Social Security and Alice receives \$600 (after \$96.40 deducted) monthly from Social Security. They also have a \$75 per month payment from a joint annuity.

The EES worker discussed with Alice the Spousal Impoverishment provisions of Division of Resources and Allocation of Income. Alice wanted to proceed with those and set off to gather the verification requested of her. In the meantime, the EES worker did referrals and gathered information regarding CARE assessment and obtained an MS 2126.

Yesterday, Alice turned in all of the necessary verification and you are ready to determine eligibility. The following is the remaining information needed to process the application: You have just received confirmation from the AAA that Thomas meets the LTC threshold for NF placement and the last screening was done_____.

You will receive the following forms:

- **Resource Assessment & Allowance (ES-3162)**
- **Income Allowance(ES-3163)**
- **Notice of Intent to Transfer**
- **Notice of Intent to Allocate Income**
- **Legal Memo**

Fill out these forms with the information provided. Once forms have been completed, process the application.